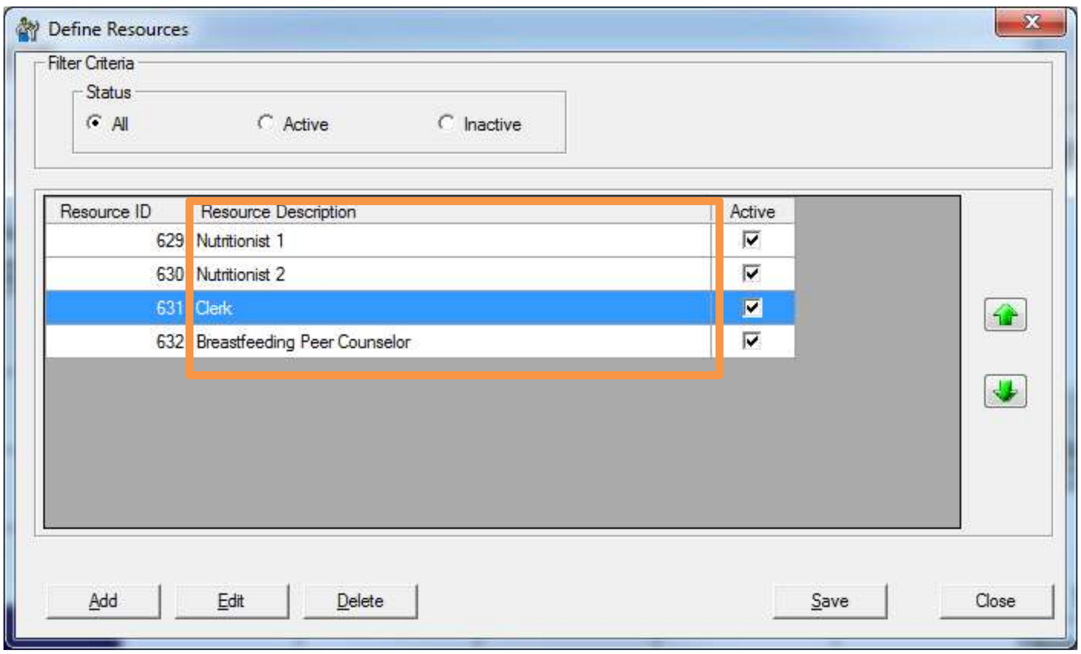
MOWINS Hot Topics - Q & A to Calendar/Scheduler Guidance

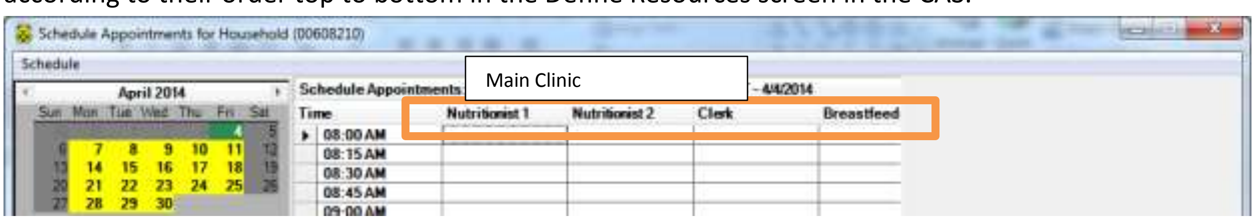
Calendar Building in Central Administrative Site (CAS)

Question: When setting up resources you said that the order of resources is the same at Agency and Clinic level, correct?

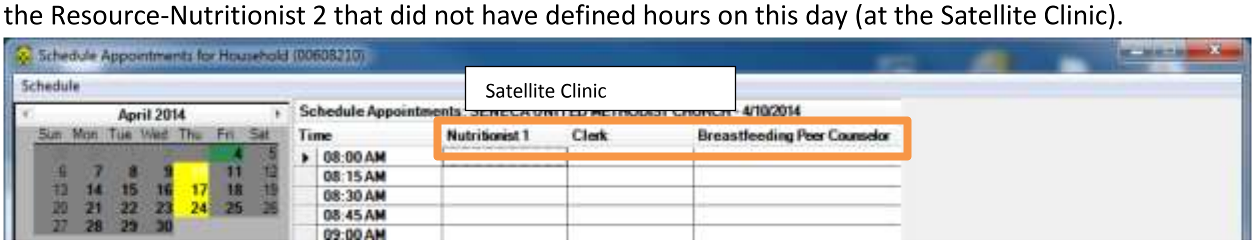
Answer: Yes, the Resource Order determined in the CAS-Define Resources screen applies to all Agency locations in the Clinic scheduler (Main Clinic site & all Satellite sites). **Note!** If a Resource does not have defined hours they will not be displayed in the Clinic scheduler.



All Active Resources have Hours defined for date selected. Resources are displayed left to right according to their order top to bottom in the Define Resources screen in the CAS.



All Active Resources with the <u>exception of Nutritionist 2</u> have hours defined for the date selected. Resources are still displayed according to their order in the Define Resources screen in the CAS minus the Resource-Nutritionist 2 that did not have defined hours on this day (at the Satellite Clinic).



Missouri WIC Eat Healthy. Stay Well.

Question: Can you define the difference between the OK and Apply buttons on the Define & Clear screens in the CAS?

Answer: The Apply is the button to use if planning to make multiple changes and do not want to be taken out of the Define or Clear screen that you are using. The OK is the button to use if planning to only make one change and do not necessarily need to be returned to the Define or Clear screen that you are using. Once the OK button is used to create a change you are taken to the Calendar Build screen (following the display of the Event Log).

Question: Is the Notes for Day feature new? Where will you be able to see the note created in the Notes for Day?

Answer: The Notes for Day feature has been in the CAS for some time, but we are unsure which release this was included in, but it is not brand new. As for where you will be able to see the note created in the Notes for Day, it will be available by clicking the Notes button in the Clinic's Schedule Appointments for Household screen in the lower left side of the screen next to the View By drop down control. Keep in mind the Notes are date specific. If a note was entered in the Notes for Day of the CAS for April 8, 2014 then it can only be accessed in the Clinic Scheduler screen when looking at April 8, 2014.

Question: When you are Defining Resources can you highlight all the resources at the same time or do you need to do each one and then repeat?

Answer: When Defining Resources if you mean setting times for Resources, yes you can select to set hours for one or more Resources if you want those Resources to have the same hours.

Question: In the CAS, is it alright to build the schedule for multiple months at one time?

Answer: It's certainly alright to build multiple months of the schedule at one time in the CAS. In some cases it may be easier to build a single month, but for others it may be simpler to build multiple months at a time. Really this is just a matter of user preference, and may depend on your clinic. Also, if you are a user new to building the scheduler you may be more comfortable building one month at a time.

Scheduler Related Items in the Clinic

Question: Can the Appointment Type Duration be set in the background/CAS?

Answer: Yes, a default duration time can be set for each appointment type in the CAS, however the person setting the appointment in the Clinic Scheduler has the ability to select a different duration length.

Question: In the View Appointments for Date screen there is a Confirm button and in the grid a Confirmed column. What is the Confirm and what is it used for?

Answer: The Confirm button is used to indicate that an appointment selected in the Scheduled Appointments data grid has been confirmed. If an agency had a staff person calling participants or mailing appointment reminders prior to a scheduled appointment they may have used this option to indicate that they confirmed an appointment. At this time however, it appears that this option is not functioning properly and we are looking into this issue. According to Shannon County, if you click the Confirm button on the View Appointments for Date screen, the Confirm checkmark shows up the next time you go into view that date.

Question: When you overbook a resource, is there any way to block that “second” column for the same resource so that the person scheduling like a clerk, doesn't accidentally overbook by filling up that column?

Answer: No, that’s a training issue. Clerks need to know if they schedule someone in that second column and it comes up red, they are actually getting that notice that the appointment is an overbooked appointment. One recommendation is to shorten appointments (in the appointment duration) if necessary to avoid overbooking, especially if you’re scheduling participants in the same Household for the same Resource.

Question: Our agency uses One Call Now to give appointment reminders. When they schedule a mom for an appointment for 30 minutes and then schedule her baby for 30 minutes right after that the One Call service calls the participant the baby’s time so they show up 30 minutes late.

Answer: Butler County uses One Call Now currently and there system is set up to call only one person in the Household and it’s at the earliest appointment so you may need to call One Call Now so your service can be adjusted.

Question: Can we keep the calendar open at all times?

Answer: The CAS Calendar and the Clinic Calendar can never be open at the same time. As for keeping the Clinic Calendar open at all times that is also not possible. The system will not allow you to keep the calendar open and work in the participant folders.

Question: Can we request an enhancement to allow the Clinic Calendar to be open at all times?

Answer: You are certainly welcome to make that enhancement request, but please be advised that enhancements take consideration, time, and are based on available funding.

Question: Why can't we reschedule from one Resource to the next Resource for the same time?

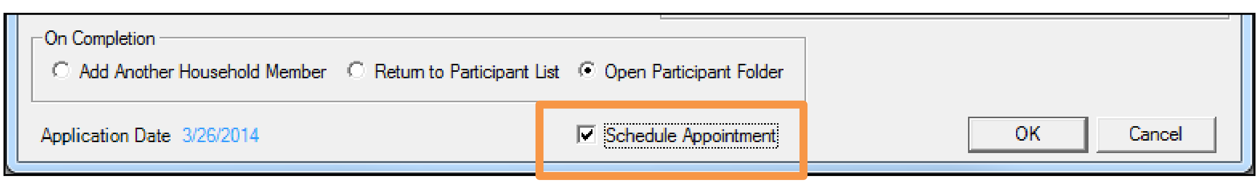
Answer: The scheduler is basically trying to prevent duplicate appointments by keeping you from scheduling the same participant for two resources at the same time even though you are attempting to reschedule the participant's appointment.

Question: Sometimes when we print off our schedule from the View Appointments for Date, the Appointment Type is missing on the print out. One Clerk can print the schedule and the Appointment Type prints, but can have another Clerk print from her computer and the Appointment Type is missing. Is there any way to fix this?

Answer: We will work with this agency to attempt to resolve the issue after the session as it appears both clerks print to the same printer. It is possible that there is a setting on the computer that may be causing the issue.

Question: For those of us who are not currently using the scheduler, can you give an example of a prescreening and accessing the Scheduler?

Answer: Fill in the Applicant Prescreening information and then at the bottom select the Schedule Appointment checkbox before selecting OK.

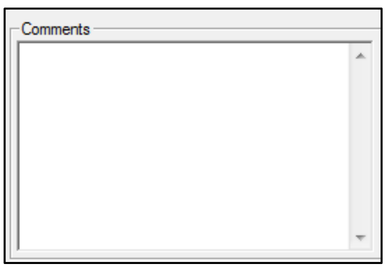


Question: If a participant decides that she can't make the appointment and needs to reschedule, do they need to change the Initial Contact date or will it always stay the same?

Answer: Initial Contact Date is the first date offered, not the first date they showed up, but if you have questions about the Initial Contact Date it's suggested that you contact your TA staff. Still, if a participant cancels or misses an appointment a recommendation is to document this in General Notes, especially if there are concerns related to policy.

Question: Is there a way for us here in the clinic to be able to see which staff member scheduled an appointment? This would help us clear up some scheduling errors.

Answer: At this time we recommend that a Report Request be submitted for this information if this is important for your agency's function or that your Agency's WIC Coordinator submit this request directly to Melissa Seaver (melissa.seaver@health.mo.gov). Another option suggested by the City of St. Joseph WIC office, is to have the staff setting the appointment record in the Comments box the date and their initials. However, if an appointment is deleted this information will also be deleted.



Question: One of the most difficult things I find in the MOWINS schedule is that you cannot block a time frame to prevent someone from scheduling that time frame in the event that an employee called in sick or had to leave early. Is there some way the state office can create a false participant to allow us to use to block time frames? I do understand that we need to delete them out at the end of the day in order to prevent any effect on our no show rates.

Answer: The State WIC Office will not create a false participant for scheduling purposes, this could damage MOWINS data. Appointments should be rescheduled. If someone calls in sick everyone should be aware of this and not schedule appointments for that Resource. If you need to "block" the Resource's schedule it is suggested that you remove any appointments scheduled for the Resource (delete or reschedule to another Resource) the go to the CAS and Adjust the Resource's hours to "clear" them from the Clinic schedule.

Question: Is there an easier way to block times on the scheduler?

Answer: At this time, the easiest way to "block" times for a Resource on the Clinic Scheduler is to do so through the CAS using the Define Resource Schedules option and setting defined hours to be open for say 15 minutes, then closed for the following 15 minutes, and so on.

Question: The View Appointments for Date is a great tool except that you can't check details on that screen. Can the information from the Participant List Show Details & the View Appointments for Date screens be consolidated by like adding a Show Details button on the View Appointments for Date screen?

Answer: That could be a great tool; however it would be an enhancement. Again, you are welcome to submit this request, but please be advised that enhancement requests all take time, but will be considered.